

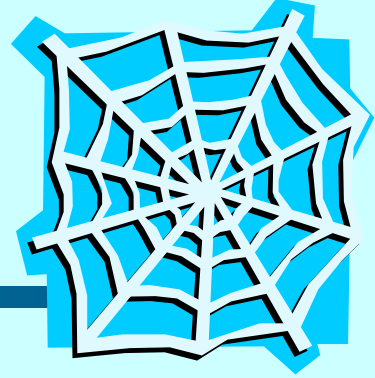
WebGrants Tips and Techniques

For Getting the Most From Your Payment Roster

Sally Atlas, Training Manager

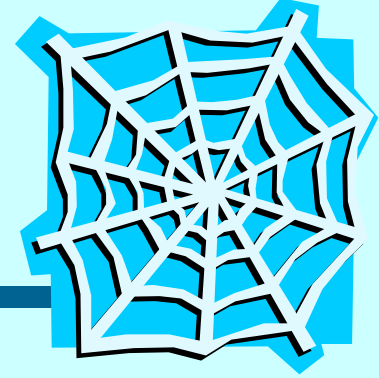
California Student Aid Commission

The CSAC Standard Roster



- Is sorted by Section, then Name, then SSN.
- Contains all records except for those reported as “Not in Attendance.”
- Is updated weekly.

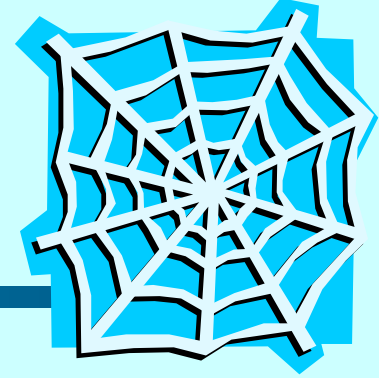
Available Data Elements



- SSN
- DOB
- Grant ID
- Cycle ID
- Housing Code
- Dependency Status
- New / Renewal

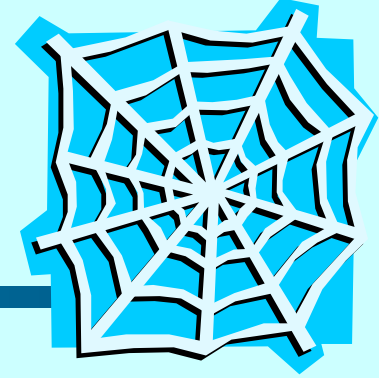
- CSAC Budget
- EFC
- Remaining Eligibility
- Forecasted Eligibility
- Roster Section

Custom Codes



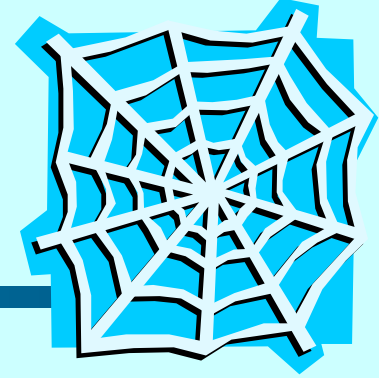
- Allows schools to create new fields.
- Custom codes can be used to include or exclude certain student records.
- School-based, all users at the school and at CSAC can view codes.

Custom Rosters



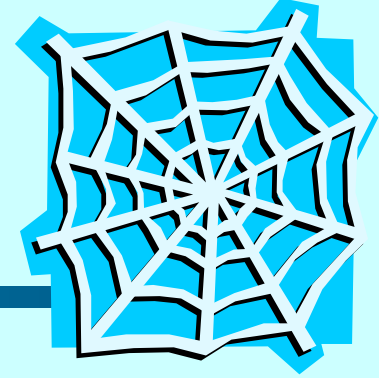
- Change the order of the fields
- Choose which fields are displayed
- Select which terms are shown
- Sort and filter individual records
 - Using existing data elements
 - Using custom codes

[Print Roster



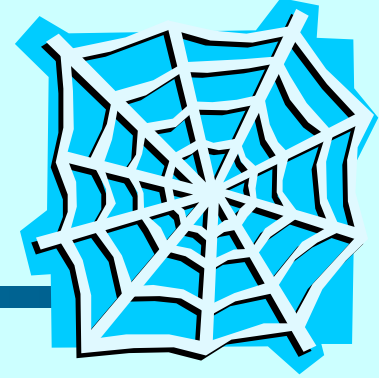
- CSAC Standard Roster
- Any user-defined Custom Roster
- Prints on standard 8.5 x 11" paper

The Display Roster Screen



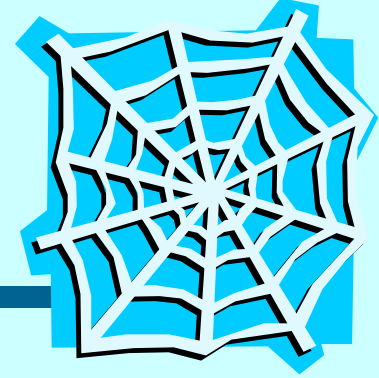
- View History link
- Search by data element
- Look up individual student
- Jump feature
- Mark all Custom Code 5

Tip #1 – Find new records



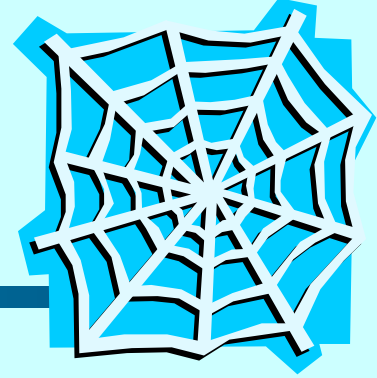
- Use the area labeled:
 - **Update all records with custom code**
(Will display in Custom Code 5 field)
- This field will add a code to ALL student records (even those not displayed)
- Select a code or series of codes to use.
Codes can be:
 - Alpha or numeric
 - One or two characters

Tip #2 – Develop Custom Codes



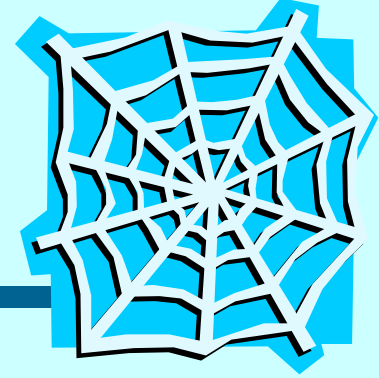
- Decide what information you want to track and set up a list of custom codes.
- After keying the codes, create custom rosters to view the data in a way that meets your needs.
- **Remember that custom codes can be viewed by all users, but custom rosters are just for you.**

Examples of Custom Codes



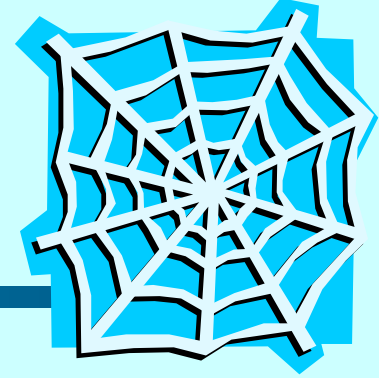
- Records that require verification
- TCP – 5th year eligibility
- Students for whom G-21s are pending
- Students on leave of absence
- Students not making satisfactory academic progress
- Records reconciled or not reconciled
- Records requiring special handling
- Anything else that meets your needs!

Tip #3 – Use the NA code



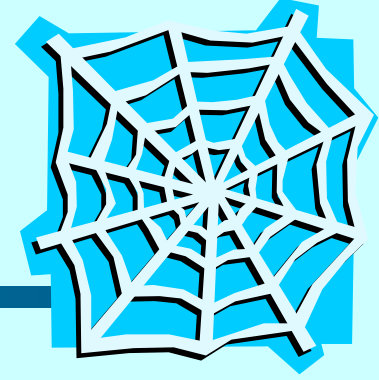
- The “NA” code moves a student into a separate section of the roster
- Students are not displayed on the CSAC standard roster
- **Remember to modify existing custom rosters for this new feature!**

Tip #4 –Identify Transfer Entitlement students



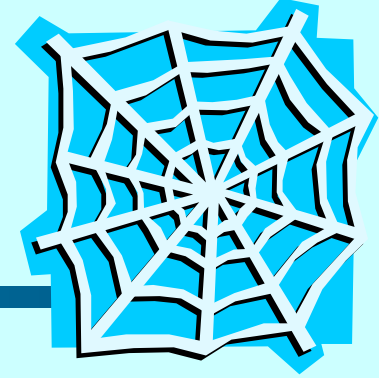
- Use a custom roster to find Transfer Entitlement students that require graduation date verification

Filtering using custom codes



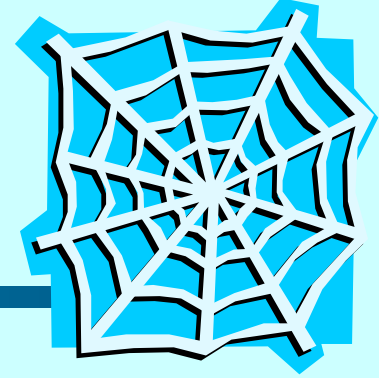
- Include or Exclude?
 - **Include** means that ONLY the records that meet the criteria will appear on the resulting roster.
 - **Exclude** means that all records will remain on the roster EXCEPT those specifically excluded.

Filtering using multiple custom codes



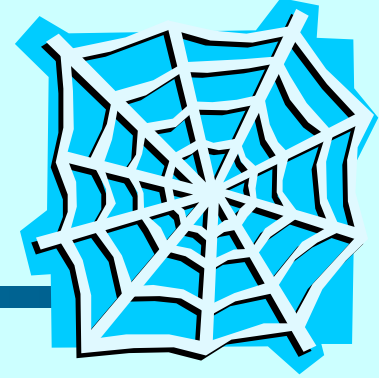
- And or Or?
 - **And** means that records meeting BOTH criteria will be included in or excluded from the resulting roster
 - **OR** means that records meeting EITHER criteria will be included in or excluded from the resulting roster.

Tip #5 - Try it and see if it works



- When filtering using custom codes, play with the and/or function and check your results
- The data is always available on the CSAC Standard Roster and so you can't "break it."

For More Information



- Use the HELP features
- E-mail OTDTraining@csac.ca.gov